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ABSTRACT

Faced with shrinking state and local tax support and an increased demand for K-12 educational reform, school leaders must use creative means to find money to improve and deliver instruction and services to their schools. This handbook describes innovative strategies that school leaders have used to find scarce dollars for purchasing educational technology. Educational technology includes computer hardware, software, video, and telecommunications equipment. Five chapters provide suggestions for: (1) stretching budget dollars and reallocating funds; (2) gathering new dollars from the community and state; (3) working with business and other organizations; (4) raising funds in schools and districts; and (5) exploring grants. Sections in each chapter detail the benefits and obstacles of each strategy. Examples of strategies in action and contact information on the educators who used them are included. (LMI)

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HOW TO FUND HARDWARE, SOFTWARE, AND MORE

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Introduction

To paraphrase American philosopher Eric Hoffer, humans are at their creative best when they cannot have their way.

His words capture the essence of the inspiration and energy of school leaders featured in this booklet who, when confronted with the realities of budget constraints, forged ahead to find money for purchasing educational technology.

While state and local tax support shrinks with little relief in sight and the demand for K-12 education reform increases, school leaders need to unleash their creativity to find scarce dollars for improving instruction and services.

Educational technology, which includes computer hardware, software, video, and telecommunications equipment, is a critical tool in delivering better instruction and services. There's no time to waste in getting classrooms equipped. Even though studies abound that confirm technology's significant impact on education, common sense tells us that 21st century workplaces will demand graduates who have experience with and knowledge of technology.

This booklet presents the ideas of many school leaders who refused to accept "no" for an answer when it came time to fund technology. You'll read how they stretched existing resources or uncovered new money in little-known places. Their inspiring determination will show you how to go from "here to technology."

Stretching Budget Dollars and Reallocating Funds

Convert to a Zero-Based Budgeting Process

Switching from a traditional line-item budget to a zero-based budgeting process forces a school district to look critically each year at its programs, personnel, instructional strategies, supplies, equipment, and professional development services. This allows districts to put acquiring technology as a top priority for the school system. The approach, which involves starting with a zero balance, entails five basic steps: (1) define desired outcomes, (2) specify the resources needed to achieve those outcomes and determine the assessment procedure and standards to evaluate effectiveness of the programs, (3) assign dollar figures to all that information, (4) design priority decision packages, and (5) select the packages providing the greatest return.

Benefits

- Zero-based budgeting helps ensure that precious funds go to the programs that will prepare students for the 21st century.
- The process allows people working at all levels (K-12) to learn about the district's programs and understand how their program fits into the larger picture.
- The focus is on student performance rather than on faculty effort and resources.
- All program managers are responsible for producing the results they predicted, which encourages them to take ownership in the budget and its successful implementation.

Obstacles

- It's difficult to change a mind-set of presuming that what was done in a previous budget year has to be done again or that every position included in last year's budget needs to be included again.
- A zero-based budget process is hard work and consumes far more time than a simple line-item budget.

In Action

Through a zero-based budgeting process, the Piscataway Township Schools in Piscataway, New Jersey, was able to free up several million dollars over a three-year period to purchase educational technology. Contact Philip E. Geiger, educational consultant, 908-418-8859.

Join a Cooperative or Consortium That Purchases Technology

Particularly appealing to smaller school districts, technology purchasing cooperatives are formed to take advantage of lower costs through large-scale buying. These buying strategies can include piggybacking onto the purchase contract of another district and working through an official state education agency established for group purchasing of technology. Cooperatives can also involve buying through educational service agencies and using a state-approved list of vendors. About a half dozen states have formal cooperatives for buying technology and 15 more have informal consortia. Contact your state education agency's technology department to find out whether your district can join one.

Benefits

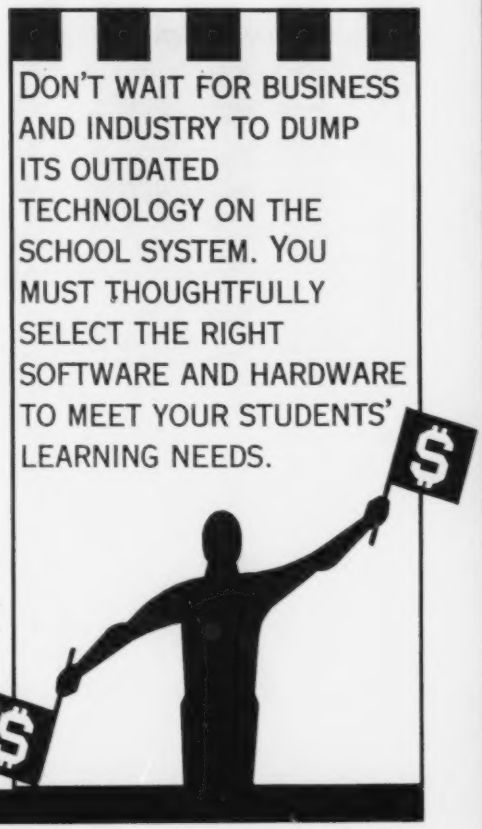
- Cooperatives help level the playing field for low-wealth, small, and rural districts that lack the buying power, expertise, and accessibility of large districts.
- Buying equipment pre-approved by the state education agency helps ensure quality, a fit with the state's curriculum framework, and an attractive price.
- By applying standards, state purchasing cooperatives enable schools to influence the technology products currently being developed.
- Some cooperatives offer professional development and can maintain equipment or negotiate service agreements.

Obstacles

- Larger districts already use economy of scale purchasing to make deals that may be better than what a cooperative can offer. For this reason, they generally don't join cooperatives.
- Larger districts usually already have staff with technology expertise and experience.
- Districts shouldn't depend on the cooperative to select the technology to buy, even though the cost savings are attractive. Schools should still carefully evaluate the wide range of products.

In Action

- IMPAC, a well-known state technology cooperative, buys hardware and software, installs, maintains, and upgrades equipment, and provides professional development for nearly all of Arkansas' school districts. Contact Cecil McDermott, IMPAC Learning Systems Inc., 501-324-9652.


DON'T WAIT FOR BUSINESS AND INDUSTRY TO DUMP ITS OUTDATED TECHNOLOGY ON THE SCHOOL SYSTEM. YOU MUST THOUGHTFULLY SELECT THE RIGHT SOFTWARE AND HARDWARE TO MEET YOUR STUDENTS' LEARNING NEEDS.
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- Florida's department of education helps small districts form their own cooperatives for purchasing technology. Large districts also may write piggyback contracts to assist smaller districts in buying hardware. Florida schools can buy personal computers from the state's department of management services, and software through the state education agency at a deep discount. Contact Charles Proctor, educational technology program specialist, 904-488-0980.
- Pennsylvania's Northwest Tri-County Intermediate Unit pools Title 1 monies from five school districts to purchase technology and other supplies, and to provide professional development for teachers. Contact Greg Martin, associate director of state and federal programs, 814-734-5610.

Privatize Noninstructional Support Services

Consider contracting out services traditionally performed by a school district to private companies. This allows schools to become customers in a market of competing providers, which could mean lower costs and greater efficiencies. A recent survey of 300 school districts showed that the majority of districts use between one and four contracted services for support operations. These contract services include transportation, printing, instructional equipment repair, HVAC maintenance, computer equipment maintenance, and food service. Studies comparing in-house and contracted custodial services found cost savings ranging between 13 and 50 percent. Cost savings realized by contracting out services can be reallocated to educational technology purchases.

Benefits

- The presence of a private provider, even if not selected, can decrease costs in services of traditional providers by introducing competition.
- Contracted services are run by industry experts who often improve the quality of the services.

Are District Dollars Slipping Through the Cracks?

It might be time to take a hard look at whether you're getting efficient use of buildings, equipment, and staff.

First, consider the savings your district will pocket by replacing outdated, inefficient lighting and heating equipment. A computerized heating operation will serve multiple rooms and spaces and save thousands of dollars annually. (For more ideas on saving money through updating facilities, contact AASA at 703-875-0748 for a copy of the report, *Schoolhouse in the Red: A Guidebook for Cutting Our Losses.*)

Second, using office technology encourages doing more with less. Administrators can use hand-held and remote dictation and transcribing equipment as well as voice and electronic mail.

Third, don't overlook the savings you'll get with a designated purchasing agent who can shop for better prices and negotiate aggressively for deals.

- The savings achieved through bulk purchasing by a private provider can be passed on to schools.
- The cost of equipment and other capital needs can be amortized through the contract with the private vendor.

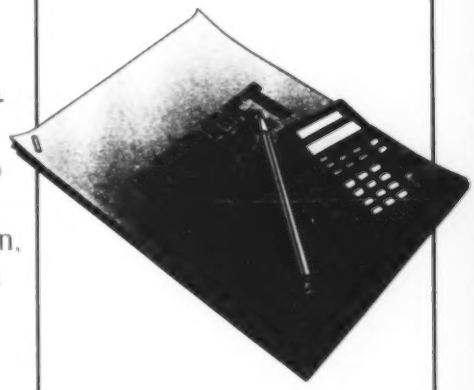
Obstacles

- Some states heavily regulate the use of school contracting, which may prohibit the practice for certain kinds of support services. Check with legal counsel first.
- While many companies supply services, they may not be located in every geographic area. Check the availability of quality service providers before making plans to contract a given service.
- After the contract is awarded, careful monitoring is necessary to ensure that goals are met and service quality is high. Some companies may promise more than they can deliver.
- Public employee unions strongly resist competitive contracting for fear of losing jobs and membership. Commitment to contracting is essential from the school board and superintendent.
- Frequently, the politics surrounding school boards and superintendents prevent them from considering competitive contracting.
- Simple cost savings may not be worth the loss of valuable employees and the effect on school climate.

In Action

The Piscataway Township Schools in New Jersey was able to shift 10 percent of the school budget over three years from noninstructional to instructional purposes due in large part to contracting out services. With a budget of $60 million, contracting for support services saves more than $2 million annually. Moreover, the sale of the district's bus fleet generated an additional $1.3 million cash infusion that was used to purchase technology. Contact Philip E. Geiger, educational consultant, 908-418-8859.

DON'T LET THE COST OF TECHNOLOGY BLIND YOU TO THE POSSIBILITIES OF CREATIVE FUNDING. MAKE TECHNOLOGY A PRIORITY FOR YOUR SCHOOL SYSTEM, THEN DEAL WITH FUNDING ISSUES.



Agree to a Lease/Purchase Arrangement

Districts can save dollars by setting up a lease/purchase agreement with a vendor or educational service agency for hardware and software. These short-term agreements, generally lasting three to five years, offer school districts the opportunity to spread the costs over a longer period of time rather than pay the full amount at once.

Benefits

- Since the initial cost of the technology is relatively low, more hardware and software can be purchased to reach more students.
- A lease/purchase arrangement gives schools greater flexibility to try newly introduced products.
- Districts may negotiate professional development and maintenance as part of the agreement.
- Companies also benefit because as their products reach more students, the demand increases for more technology.

Obstacles

- Schools need to make sure the new equipment and software fits appropriately into the curriculum.

In Action

- The Yamhill Education Service District in McMinnville, Oregon, offers a three-year lease for equipment to help financially strapped schools. The equipment includes computers, CD-ROMS, videodisc players, modems, scanners, televisions, VCRs, and printers. Each lease provides for installation, maintenance, and cost-free repair of equipment and from seven to 11 three-hour professional development sessions. At the end of the lease, the schools may upgrade their equipment and continue to lease or buy the equipment for an additional fee. Contact Kaye Matkins, technology coordinator, 503-472-1431.
- The Taylor County Elementary School in Butler, Georgia, negotiated a lease/purchase agreement with a vendor to create a 24-station computer network plus 30 hours of hands-on teacher training for the network and software. Contact Tom Callier, curriculum director, 912-862-3588.

CHAPTER 2

Gathering New Dollars from the Community and State

Capture a Portion of State Lottery Proceeds

In states where a portion of lottery proceeds are allocated toward elementary and secondary education, school districts are, in some cases, reaping millions of dollars. Contact your state department of education or state legislator to find out if and how your schools can use lottery money.

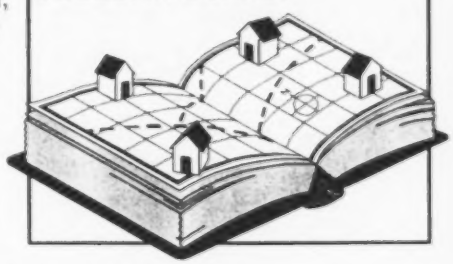
Benefits

- A possible massive infusion of funds allows large-scale technology change in every school throughout the state, if they so desire.
- Lottery proceeds drastically shorten the time to acquire and place technology in schools.
- Local school districts can design initiatives so that funds flow directly to the classroom for meeting instructional needs quickly.

Obstacles

- Depending on state law, lottery money can have specified uses. For example, it may be prohibited from being spent on administration, training, furniture, and maintenance; and may be only used to purchase equipment.
- There might be an impression among community members that lottery funds can supplant, rather than supplement, regular funds.
- Some community members might be concerned about the use of "gambling" money to support education.

DO MEET WITH OTHER SCHOOL LEADERS TO SHARE IDEAS ON CREATIVE FUNDING STRATEGIES. THEN, CONSIDER SHARING THOSE IDEAS THROUGH SUCH VENUES AS A NATIONAL FORUM OR CONVENTION, OR AN ELECTRONIC BULLETIN BOARD.



In Action

Proceeds from Georgia's Lottery for Education program allocated $86.4 million in fiscal year 1994 to purchase computer hardware and software and equipment for networking and telecommunications, as well as to fund state education technology centers where educators learn to use new technologies. Contact Bailey Mitchell, instructional technology program director, Georgia Department of Education, 404-656-2521.

Raise Funds Through Bonds

Bond issues are particularly important for older communities and cities that need an infusion of cash to make infrastructure improvements, which can include the purchase of educational technology. Often, voters are willing to support a bond issue if the proposal is well-crafted and easily understood. The proposal should detail exactly how the bond money will be used and the reasons why these projects are so critical to the community. Bond issues should be approached much like a political campaign, complete with publicity, polling, and strategic planning.

Benefits

- A bond issue infuses the school district with significant cash to make large purchases of technology, which results in large-scale change quickly.
- Through the bond issue campaign, the awareness of school district needs are raised among community and business members.

Should Your District Sell Mini-Bonds?

To raise money for technology, school districts can sell mini-bonds in as small amounts as $500 to the general public. (Regular bonds are sold in large blocks to banks or investment companies, which then sell to the public.) The benefit of mini-bonds is that small investors can directly support school technology programs and reap financial rewards. Also, mini-bonds allow funds to be raised without high brokerage costs.

The downside is that the school system becomes involved in the retail aspect of selling financial instruments and assumes a certain amount of risk if the mini-bonds are not sold quickly. Check with state and local laws before moving ahead.

Obstacles

- The majority of adults do not have school-age children, which can make voter support for a bond issue difficult to obtain.
- Studies have shown certain factors to be linked to a successful bond issue campaign including high voter turnout, an active citizens support group, and quick response to opposition groups, all of which demand a great investment of effort and planning.
- School districts need to be cautious that the technology purchased with bond money will not become obsolete during the life of the bond issue, or be able to explain clearly why obsolescence occurred.

In Action

In 1993, the West Bloomfield, Michigan, schools successfully raised a $26 million bond issue of which $10 million was earmarked for purchasing technology equipment and retrofitting school buildings for wiring to accommodate telecommunications. Key to their success was a citizen's committee composed of technology experts who advised on strategies and equipment. Contact technology coordinator Wanda Cutchins at 810-738-3338, or superintendent Seymour Gretchko at 810-738-3550.

Issue Certificates of Participation

School districts, with the help of a national investment firm, can sell long-term certificates of deposit. The debt service can be extended over a long period of time and school property (the land on which the buildings sit) can be used as collateral. Thus, the school system uses an unrealized asset to provide financing of long-term debt, which can include the purchase of technology and capital improvements. Typically, the repayment of the loan must be consistent with the life of the equipment so if hardware and software are purchased, they must be amortized over five years. However, building improvements can be amortized over a longer period, up to 30 or 40 years.

Benefits

- Generally, enough money is raised to finance large technology purchases that allow school districts to implement districtwide programs.
- Depending on the term length and available interest rate, it's possible to incur this long-term debt at a stabilized tax rate either through a decrease in the tax rate, and/or by consolidating other debts under the same plan and maintaining a level debt service.
- School board turnover does not affect the continuation of the project.
- Certificates of participation are similar to school bonds, except that they don't require a public vote.

Obstacles

- The community may feel that the board has circumvented the public referendum process thereby disenfranchising the voters.
- If there is no outstanding debt, consolidation of old debt wouldn't be possible, and would result in at least an initial increase in taxes.
- Selling certificates of deposit is fairly costly because of the required issuance of public financial documents and disclosure forms.

In Action

Through the sale of certificates of participation, the Piscataway, New Jersey, Township Schools recast approximately $15 million of old debt at a substantially lower rate and added another $9 million for technology purchases and retrofitting. Because the funding for facilities was extended over several years and the percentage rate was lower, the debt service was fairly level for the term of the financing. Contact Philip E. Geiger, educational consultant, 908-418-8859.

Seek Developer Concessions with Educational Impact Statements

In most communities where housing and commercial developments are under way, planning boards require environmental impact statements from developers

that outline the project's negative and positive effects. But planning boards rarely look at the impact on the educational system, though it's generally recognized that any housing development rarely produces enough taxes to fund students who may come from the housing. School districts can collect significant revenues for technology purchases if developers voluntarily contribute a specified amount per household when the new homes are ready for occupancy. The planning board may grant developers concessions in return for their voluntary contribution.

Benefits

- This strategy works best in communities with growth and new construction.
- Some developers will not perceive the need to help the school district in meeting its demand for facilities.
- Planning boards frequently wish to make no further concessions to developers and therefore, it may be difficult to get developers to contribute voluntarily.
- By waiting until occupancy certificates are issued and the homes are ready for sale, the developers' cash flow isn't substantially affected.

Obstacles

- The developer loses some profit or passes along the cost to the new homeowner at time of settlement.
- Some community members might object to giving developers more concessions in exchange for contributions.
- In light of this new source of revenue, voters may feel complacent about supporting school budgets and bond issues.

In Action

Since the 1970s, Galloway Township, New Jersey, has granted minor density concessions to developers in order for them to voluntarily contribute $300 to $500 per household upon delivery of the certificates of occupancy. The school district has been successful in generating more than $2 million to make basic improvements without having to raise taxes. Contact Philip E. Geiger, educational consultant, 908-418-8859.

Push for a Family and Education Levy

Your school district and city can work together to pass a levy for a specified period of time to fund projects that would benefit both families and education, such as dropout prevention centers, student health clinics, and large technology purchases. This strategy has great appeal to voters who can see the broad impact of their dollars directly supporting family- and child-oriented projects. After the

projects are funded, an oversight committee composed of government, business, community, and school leaders can be appointed to review progress.

Benefits

- Barriers between city and school district bureaucracies that may have existed are broken down as all work toward a common goal.
- Because the city passes the levy instead of the school district, it may have easier requirements for voter approval.
- The oversight committee provides a forum for dialogue on not only implementing school-based improvements, but also examining factors outside the school that affect education.

Obstacles

- To validate the need for a levy, school districts may have to open their operations and budgets to scrutiny by city leaders, who may not share the districts' same views or priorities.
- To successfully bring diverse views to the table, a mediator might be needed to facilitate discussions.
- Eventually, the levy will end and another will have to be passed to keep funding levels current.

In Action

In Seattle, Washington, a citizens group composed of the mayor, governor, business leaders, and community members, after studying the school district's operations and budget, approved the district's request for a levy. The voters agreed in 1990 to pass a seven-year, $69.2 million levy that supports a number of different projects targeted toward education and families. Contact Robert R. Gary, director of Summit and Levy Implementation, 206-298-7045.

Negotiate Funds from Local Redevelopment Agency

Redevelopment agencies are formed to fund urban or rural renewal projects and function basically as a city or county "savings account." The redevelopment agency is allowed to capture a portion of the property taxes to put into a type of savings account that will be used toward specific capital improvements. School districts can negotiate with the redevelopment agency for a portion of that money to use in making structural improvements and purchasing technology.

Benefits

- Rather than waiting for the distribution of funds from the redevelopment agency, schools have the option of capturing a portion of that money immediately through issuing bonds.
- Once the negotiations are complete between the district and redevelopment agency, it's a painless way to raise substantial funds through a community

Obstacles

- School districts face competition for the money from other segments of the community, which need street repairs, building construction, etc.

In Action

The Norco, California, redevelopment agency allotted a one-time amount of $600,000 so that each of its six school campuses could finance capital improvements including instructional technology. Contact Carolyn Bartleman, city finance director, 909-735-3900.

Tap into Local Cable Revenues

Consider working with your local government to tap into annual taxes on revenues generated by your cable company. This money, which sometimes is pooled into a general fund for use by the county, can be distributed in grants to schools for educational technology purchases. Also, in communities with cable, customers usually pay a franchise fee that goes to the government entity that authorized the cable. You may want to explore the possibility of using a portion of that to purchase technology.

Benefits

- The money gathered from taxes supports a visible project within the community.
- Because the money is generated from cable companies, the grants are generally targeted toward television-oriented technology, such as video and satellite dish equipment.
- Districts could also explore the same opportunities with the local telephone companies to tap into grants for telecommunications and fiber optic technology.

Obstacles

- Negotiations are necessary with the taxing agency to direct a portion of the money toward schools.

In Action

The Prince George's County, Maryland, Public Schools, after negotiating with the county to capture a portion of the 5 percent cable revenue tax, received a one-year grant in 1989 to purchase hardware and make infrastructure improvements for technology. Subsequently, the school district has received ongoing annual grants for approximately $200,000 each to cover teaching aides and maintenance costs. Contact Scott Schiller, Office of TV Resources, 301-386-1619.

CHAPTER 3

Working with Business and Other Organizations

Create Partnerships with Local Colleges and Adult Education Programs

Do you have a community college in your state that would like to expand its course offerings in your town? Consider creating a partnership with the college whereby the college holds evening computer classes on one of your school campuses to attract local adult learners. In return, the college funds all or a portion of the hardware and software used for its evening classes and allows the school to use the equipment during the day.

Benefits

- Technicians from the college install and maintain hardware and software.
- This program nurtures an ongoing liaison between the college and school district that can result in other beneficial programs for students and adult learners.
- School district staff can ask questions and learn from the college's computer experts, which can serve as a powerful staff development experience.

Obstacles

- Once the program becomes successful, the college will probably look to expand its program beyond your campus, and may need to move the computer equipment.

In Action

Corona High School in Corona, California, teamed with Riverside Community College to create a 46-station computer lab at the high school. Each funded half (approximately $30,000) to start up the program. The high school had access to the lab from 7:30 a.m. to 4 p.m., while the college used the lab from 4 to 10 p.m. Contact Tom Wilson, director of educational technology for the Corona-Norco Unified School District, 909-736-5000.

Establish a Credit Card Program

Consider issuing VISA and MasterCard credit cards through a local bank as part of an awards program that benefits the school district. For example, 1 percent of the amount on every purchase is awarded by the bank to a school district foundation or fund, which in turn, distributes the money to schools for purchasing

technology and other items. An attractive first-year package might be offered with no annual fee and a low introductory rate. However, subsequent interest rates should be competitive with current credit card offerings.

Benefits

- It's an effortless, almost invisible way for people to donate money without costing them anything out-of-pocket.
- The venture is relatively low risk with low start-up costs.
- This partnership is attractive to local banks who want to create another niche in a competitive credit market.

Obstacles

- Often, groups see a big return the first year, but reduced revenue thereafter when the introductory rate ends.
- This venture is relatively untried among schools as a fund-raising mechanism.
- The program needs a strong ongoing marketing effort that includes regular promotional mailings and telemarketing campaigns.

In Action

Fairfax County Public Schools, in Fairfax, Virginia, launched a credit card program through its foundation with estimated first-year returns for 1995 at more than $100,000. This is based on 5,000 cardholders who average $2,000 in credit card purchases annually. Contact Robert C. Kelly, executive director, Education Foundation, Fairfax County Public Schools, 703-534-3635.

Develop Local Business Partnerships

Only imagination limits the variety of business partnerships a district can develop. By aligning support in formal relationships with local businesses, your district can tap into a large pool of resources that benefits students, teachers, administrators, and the community. Successful partnerships typically benefit the donor as well, such as a business offering technology in exchange for teachers developing an instructional program that trains future workers. If your district is small or rural and has no significant business interests, look to corporations that do business in rural areas.

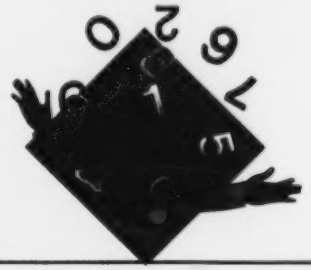
Benefits

- Partnerships connect businesses to schools, which encourages a sense of responsibility among the community to ensure students succeed.
- Often, businesses are eager to make sure students receive the proper training and education in schools rather than in workplaces after graduation.
- Successful partnerships open the doors to more ways for schools and businesses to work together.

Obstacles

- A lifelong educator may find it difficult to listen to an outsider's view of how to improve schools.
- Goals and results for any business-sponsored program need to be formally stated from the beginning or misunderstandings may occur.
- If school administrators aren't enthusiastic about welcoming change, then the partnership probably won't work.

DON'T STOP AT JUST ACQUIRING THE TECHNOLOGY. NEGOTIATE STAFF PROFESSIONAL DEVELOPMENT COSTS AS PART OF THE PURCHASE PRICE OF SOFTWARE.



In Action

- The *San Jose Mercury News* in San Jose, California, publishes an annual WishBook that profiles community members who can't afford to buy necessary items. At the urging of a community member, the paper devoted one entire WishBook to 260 of the area's neediest schools and featured brief profiles of each with their respective budget problems. More than $70,000 was raised from readers as well as significant equipment donations from local businesses. For more information, contact Mike Oricchio, WishBook coordinator, at 408-920-5221.
- The Jefferson County, Kentucky, Public Schools created a partnership with a local machine company frustrated with the lack of qualified employees. The company offered to buy equipment for one vocational/technical education center if the staff developed an instructional program and trained students to operate computer-aided design and computer-aided manufacturing equipment. The company then offered to give students on-the-job training and to consider hiring the program's graduates. The center also trained current company employees in the evenings and summers. Contact Patty Hearn, deputy superintendent for communications, 502-485-3409.

Solicit Corporate Funding for Specific Projects

Consider approaching local large corporations for funding whole projects such as outfitting computer labs, a specific classroom, or even a new school. Then, get recognition for these large gifts by prominently displaying the corporate logo in the lab, classroom, or school building. To promote the strong link between the corporation and school, a special open house can be arranged at the school for employees and community members. Or hold a special dinner event for key representatives of every corporation that donated.

Benefits

- An ongoing relationship with corporations can offer long-term benefits for other parts of your school district.
- Building a firsthand understanding among corporations about the challenges schools face promotes solid support among the business community.

Obstacles

- Community members and parents may view the conspicuous corporate support through displaying logos and other events as too much commercialism in schools.
- Sponsor identification must be incidental and appropriate and not appear to promote a product or company.

In Action

- To launch their effort to put computer labs in 130 of the district's 160 schools, the Jefferson County, Kentucky, Public Schools created a campaign called "The New Kid in School." The campaign required 20 percent to be raised by each school, 20 percent paid by the school system, and the remaining 60 percent to be paid by a corporate donor matched to an individual school by the district. Adding a state grant that matched funds raised from community sources, the campaign raised $9 million in six years. Contact Patty Hearn, deputy superintendent for communications, 502-485-3409.
- A local telecommunications business contributed more than $20,000 in distance learning equipment and wiring to the Fox Chapel Area School District in Pittsburgh in exchange for occasionally bringing potential customers to view the system. Contact Helen Sobehart, assistant superintendent, 412-967-2434.

Set Up a School Fund with a Local Service Organization

Consider asking a local community service organization, such as your Jaycees, Rotary or Lions Club, or Chamber of Commerce, to launch a school fund for excellence. The service group could solicit local businesses for cash donations and have input into deciding how to allocate the dollars for technology programs. These allocation decisions could be made on the basis of solicited proposals or predetermined criteria, but always in line with school system plans.

Benefits

- Capitalizing on a reliable network of community supporters that's already in place saves time and money.
- Businesses are influenced by the projects other businesses support in the community and most likely will be motivated to participate to remain competitive.

Obstacles

- A lifelong educator may find it difficult to listen to an outsider's view of how to improve schools.
- Goals and results for any business-sponsored program need to be clear from the beginning or misunderstandings may result.

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In Action

The Iowa City, Iowa, Public Schools worked with a local company to create a plan for placing computers and networking equipment throughout the district's schools. They approached the Chamber of Commerce, which became so enthused with the idea that it decided to spearhead the fund-raising campaign by targeting each of its members for donations. More than $310,000 was raised in the three-year effort. Contact Barbara Grohe, superintendent of Iowa City Schools, 319-339-6800.

Convene a Forum for Business and School Leaders

Invite corporate leaders and foundation funders who are interested in education to a forum where they can mingle with school leaders and discuss solutions to student problems. You might consider presenting a general panel discussion to set the tone, then follow up with small, focused workshop sessions mixed with school, corporate, and foundation leaders. Or you might want to consider keeping the number of leaders small and focus the entire forum on one roundtable. At the end of the forum, you may want to solidify a commitment for providing dollars, equipment, or professional development.

DO SELECT YOUR COMPUTER SOFTWARE FIRST, BECAUSE IT WILL RUN ON SEVERAL DIFFERENT HARDWARE SYSTEMS. THEN LET YOUR SOFTWARE GUIDE YOUR HARDWARE PURCHASING DECISION.

Benefits

- Funders who have a real hand in planning solutions are more likely to allocate precious and often scarce funds for technology.
- This type of forum fosters ongoing, synergistic relationships with outside constituents that may prove profitable well into the future.

Obstacles

- While bringing together diverse ideas is good, school leaders might experience a sense of losing control during discussions.
- You might have to diplomatically deflect proposals that are educationally and organizationally unacceptable.

In Action

The Allegheny Policy Council on Youth and Workforce Development in Pittsburgh, Pennsylvania, sponsored a day-long retreat for more than 300 business, government, foundation, and education representatives to focus on the status of technology and science education in the region. Out of that meeting, the regional Math/Science Collaborative was born, which coordinates efforts and resources to meet area school needs for technology in an organized fashion. Contact Eric Stikney at the Carnegie Science Center, 412-237-1655.

CHAPTER 4

Raising Funds in Schools and Districts

Launch a Parent-Teacher Association Campaign

Although the involvement of parent-teacher associations (PTA) has broadened with school governance issues, many still raise significant amounts of money toward purchasing technology. Creativity abounds in these groups, which usually have used tried-and-true methods for raising money including bake sales, 10K runs, raffles, or fairs.

Benefits

- A fund-raising campaign solidifies support for school programs among parents, teachers, and community members, and promotes a sense of personal responsibility for the programs' success.

Obstacles

- If a PTA chooses to raise money only for one school, then the district's other schools will not benefit from the effort. Inequities in funding can become a major political issue for schools.

In Action

- Charter Oak Limited School District in Covina, California, raised more than $5,000 for technology by sponsoring a Math-a-thon where students collected pledges based on the number of math problems solved correctly. Contact Carol Gilkinson, technology coordinator, 818-914-2704.
- A district in Florida raised $12,000 in a single weekend by hosting a technology fair in a local mall. Mall merchants donated electricity and computer vendors donated equipment so that students could demonstrate different software programs to passersby. A giant fishbowl with an accompanying sign, "Donations to the School Technology Fund," reminded visitors to show their support.

Create an Alumni Association

Like any college or university, school districts can establish an alumni association for many of the same purposes including fund-raising. Most alumni associations are founded to cultivate relationships and communicate with graduates. They may also be involved in promoting class reunions and may charge membership dues as well as publish a newsletter and a directory. Funds can be easily targeted to educational technology purchases.

Benefits

- If alumni associations are structured as a foundation or are part of a foundation, then the association can attract and accept significant tax deductible gifts.
- Your target donor audience has firsthand experience and knowledge about the district's programs and goals for technology.

Obstacles

- Don't be too eager to tap into the donor base immediately. It takes about 18 months from starting the alumni association to soliciting members for donations.
- Costs include repeat direct mail promotions to members.
- Many alumni associations don't ask for large enough contributions.

In Action

Wall Township, New Jersey, schools has set up its alumni association as part of the Wall Educational Foundation for Excellence. The alumni association will be part of a major campaign to raise $25,000 to equip the district's multi-media centers with computer hardware and software. Contact John Weaver, executive director of the Wall Foundation, at 908-449-4519.

Introduce a Bequest Program

Seven out of 10 Americans die without a will, according to *Giving USA*. If community members were urged to prepare their wills and consider leaving a small percentage of their estate to their local school district, the revenue generated for technology purchases could be enormous. Setting up the bequest donation process is best handled through your school district foundation (see "Create Your District's Own Foundation," page 21). Your foundation director should work with an attorney to ensure compliance with state and federal laws.

Benefits

- Bequests can result in significant revenues for technology because it's one of the least used sources for fund-raising.
- This fund-raising technique costs the school foundation little to manage aside from maintaining awareness of the program.
- Foundations can also suggest to families that in lieu of flowers at a funeral, funds be sent to the school district, especially in the event of a school community member's death.

Obstacles

- A bequest program is a fund-raising strategy usually used by more mature foundations that have some established visibility in the community.
- This technique usually won't realize any immediate significant funds, but will pay off between five and nine years after the program's start based on increased awareness.

Potpourri of Fund-Raising Ideas

Great ideas for raising money to purchase educational technology are endless. Here are some fund-raisers that have worked for districts across the country.

- Two Galena, Alaska, school board members went door-to-door convincing parents that students needed laptop computers. As a result, enough money was collected to purchase 33 laptops—one for each of the small town's high school students.
- One district provides a "memory" service for a fee. Students using school computers help remind local residents of important anniversaries, birthdays, and other special dates. Subscribers send students the information they want kept on file and indicate how may days in advance they want the reminder sent.
- The Del Oro High School athletic booster club in Loomis, California, rakes in almost $20,000 a year through a game called cow-chip bingo. Every fall, chances are sold for one-yard squares marked on the field where three cows are let loose. Winners collect if a cow selects their square to "place its chips."
- Floridians can now purchase License to Learn license plates, which feature a graduation cap and diploma inside an apple. Fifteen dollars from each sale go to local education foundations to support school projects, including the purchase of technology.

In Action

The Wall Educational Foundation for Excellence in Wall Township, New Jersey, introduced a bequest program in 1994 that urges donors to contribute to a school memorial fund instead of creating individual memorial scholarships as is common in the death of a student. The foundation works with local funeral directors who can remind the families of this option. Contact John Weaver, executive director of the Wall Foundation, at 908-449-4519.

Create Your District's Own Foundation

Many experts believe that the most fruitful sources of new funding require establishing a district educational foundation, which will provide tax benefits to donors who otherwise might not give to public schools. Cash contributions may be made on a tax-deductible basis by both individuals and businesses. Foundations act as a channel through which businesses, organizations, and individuals may also donate technology equipment and expertise.

Benefits

- ➤ Through a foundation campaign, you'll create a systematic approach to contacting all potential donors, including large corporations, small businesses, alumni, and parents.
- ➤ A foundation's resources can be spent in creative ways, depending on its stated purpose. One district uses a portion of its foundation's money to empower

teachers to determine the direction of curriculum innovation and of their professional development.

- Foundations can help develop partnerships for more projects between schools and businesses.

Obstacles

- Some danger exists that foundation board members might try to force programs and values on a school district that infringe on community preferences, so many foundations' bylaws state that they may only solicit funds for approved school projects.
- Some community members may feel that donations to a foundation are superfluous in light of their taxes that support schools.

Start-Up Tips

- Because each state's requirements for foundations will differ somewhat, it's wise to create your foundation by using as a model the bylaws and filing papers of other foundations already established by school districts in your state. Then, ask for a legal review by an attorney.
- Carefully select the members of your foundation board. Representatives should include executives from local businesses, chamber of commerce members, and professional fund-raisers.

In Action

- The Jefferson County Public Education Foundation, created by a group of community leaders working with the Jefferson County, Kentucky, Public Schools, has raised more than $11 million through technology programs including the New Kid in School (see page 17). The foundation individually solicits major businesses and other foundations. Contact Patty Hearn, deputy superintendent for communications, 502-485-3409.
- The Williamston Community School Foundation in Williamston, Michigan, used the goal of funding a computer lab to kick off its first campaign in the early 1980s. Since that time, the foundation has raised more than $750,000 in the small rural community and has put computer labs in all its schools. To make technology improvements, the foundation successfully led a fund-raising campaign to match the district's contribution of $50,000. Call Jeri Mifflin, director of community education, 517-655-3530.

DO ENCOURAGE EVERYONE IN YOUR DISTRICT TO BECOME FAMILIAR WITH COMPUTERS. THE MORE PEOPLE WHO UNDERSTAND TECHNOLOGY'S POTENTIAL TO ENHANCE EDUCATION, THE MORE LIKELY THE FUNDS WILL BE FOUND.

Sponsor Adult Education Evening Workshops

If your school district already has technology equipment, consider offering evening workshops for adult learners. You'll meet a community need and raise funds through course fees to purchase technology. Profits can be recycled back into the programs to pay for additional software and hardware that benefit both students and adult learners.

Benefits

- Instructors who also teach adults in the evening bring a new perspective back to the regular classroom. Many say they appreciate their students more after teaching adults.
- Networking between adult learners and regular students can enrich the educational experience of high schoolers. For instance, adults may invite students to tour their workplace.

Obstacles

- Managing such a program takes a significant time investment, estimated between five to seven hours a week.
- Competition from other districts, companies, and community programs can reduce profits.

Start-Up Tips

- Need computer equipment to start an adult education program? One district launched its program with a donation from a local computer store of 10 personal computers in exchange for a set portion of tuition fees.
- Advertise program offerings through mailings to students' homes and in local computer-oriented magazines.

In Action

Minuteman Technical High School in Lexington, Massachusetts, offers seven to nine courses ranging between four and 30 hours each, with hourly fees charged between $10 to $25. The program nets between $17,000 and $30,000 annually. Contact computer coordinator Earle D. Hancock at 617-861-6500.

Are Your Schools Wired for Technology?

A recent General Accounting Office (GAO) survey concluded that schools' infrastructure is not ready for the 21st century. Only about two-thirds of the schools reported having sufficient power in the buildings to sustain technology, and barely half reported having adequate wiring.

"As a result," education expert Gerald Bracey observed in the May 1995 issue of *Inside Washington*, "some schools have computers but can't plug them in. Some found that if more than four teachers at any time tried to use computers, the circuit breakers tripped."

The report does not specify how much money might be needed for these renovations, Bracey said. However, one estimate was about 7 percent of a total school budget annually.

Offer After-School and Summer Instruction

Fees may be charged for after-school and summer instruction for students who need tutoring or would like to explore a subject not offered during the regular school day. Districts can also set up a computer loan program whereby students rent equipment to take home for a period of time.

Benefits

- Parents can be invited to learn more about technology alongside students. Parent participation will help build a strong support base for schools.
- Students can develop special skills and explore advanced technologies beyond traditional offerings.

Obstacles

- Costs for running the program include teachers and maintenance services.

In Action

Minuteman Technical High School in Lexington, Massachusetts, offers a summer computer camp for boys and girls ages 9 to 14 where they learn computer programming language and computer-aided design techniques. Tuition is $375 for the two-week session that runs Monday through Friday from 8:30 a.m. to 3:00 p.m. Contact Earle D. Hancock, computer coordinator, at 617-861-6500.

DO PUBLICIZE YOUR GRANT-SEEKING SUCCESSES TO YOUR COMMUNITY. THE RESULTING POSITIVE PUBLICITY WILL SUPPORT YOUR DISTRICT'S FUTURE EFFORTS TO PURSUE CREATIVE AND INNOVATIVE PROJECTS.

CHAPTER 5

Exploring Grants

Grants can provide large sums of money for exciting new technology projects that school budgets just can't support. Grants, which come in all sizes and from many different sources, give educators the chance to work toward an educational solution that might not otherwise be achievable. Often, simply writing the grant proposal gives educators a planning tool to sharpen the district's short-term focus and shape a future vision.

Benefits

- In addition to receiving much needed hardware and software, a district can enrich its staff development and student learning opportunities through the innovative pilot programs launched by the grant.
- If your district's proposal is funded by a vendor, you'll probably receive extra technical advice and support from consulting experts because of the vendor's commitment for the program to succeed.
- All grants come "free"; that is, you are not required to pay back any money.
- If your grant proposal is not funded on the first try, you can tweak the proposal program to fit other funders' requirements, then shop it around.

Obstacles

- Your school district might be limited in the scope of the technology program depending on the grant provisions.
- Competition for any grant will be stiff, so your proposal should reflect considerable time in its preparation.

U.S. Department of Education and Other Federal Programs

Don't limit your sights only to grants given by the U.S. Department of Education (ED). While the department is a good place to start, there are plenty of opportunities to tap into dollars from other federal agencies. Here are some ideas to begin your research:

- U.S. Department of Education Information On-line. If you have access to the Internet, then you have a rich collection of resources at your fingertips through the department's Gopher/FTP/World Wide Web site. Learn about funding opportunities, use directories of effective programs, and look at statistical tables, charts, and data sets. For instructions, call 202-708-7774.
- ED's Office of Educational Research and Improvement sponsors a toll-free electronic bulletin board where computer users can retrieve statistical data.

research findings, and ED information 24 hours a day. Call via modem 800-222-4922.

- ED's Grants and Contracts Service. This department operates ED Board, which provides on-line access to information about programs, current funding opportunities, and more. Call 202-260-9950 via modem 24 hours a day.
- *The Federal Register.* This daily publication contains notices of new grants from federal agencies, grant application guidelines, and regulations and requirements for federal grant programs. To order, contact Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402; 202-783-3238.
- Capitol Publications publishes a number of helpful resources including *Education Grants Alert: The Weekly Report on Funding Opportunities for K-12 Programs* and *Federal Grants and Contracts Weekly*. Call 800-655-5597.
- The Department of Commerce's National Technical Information Service disseminates technical information, services, and products. For information, contact NTIS, 5285 Port Royal Road, Springfield, VA 22161; 703-487-4600.
- The National Science Foundation provides $14 million annually in grants for math, science, and technology for K-12 education. Contact NSF, Division of Elementary, Secondary, and Informal Education, 4201 Wilson Boulevard, Room 885, Arlington, VA 22230; 703-306-1620.
- The Department of Labor administers the Job Training Partnership Act (JTPA), which funds education technology projects for vocational education programs. Call your state's Job Training Partnership Act liaison.

Private and Corporate Foundations

In 1992, the 100 largest private and corporate foundations in America awarded 1,353 grants totaling $202 million to elementary and secondary education, according to *Foundation Giving: 1994*. This represents a 41 percent increase over 1991 grants, reflecting the growing trend of foundation interest in K-12 public school programs. Consult the following resources to get started on your requests for funding:

- More than 2,000 foundations and corporate direct giving programs that target K-12 education are noted in the *National Guide to Funding for Elementary and Secondary Education* published by The Foundation Center. Contact 800-424-9836.
- *Grant Guide 1994-95* for elementary and secondary education lists grants for academic programs, scholarships, testing, professional development and education, and more. Contact The Foundation Center, 800-424-9836.
- *The Education Grantseeker's Guide to Foundations and Corporations*, published by Capitol Publications, offers information on private funding opportunities and how to apply for foundation grants. *Education Funding News*, also published by Capitol Publications, highlights private and public grants for education. Call 800-655-5597.

Need Help Writing a Grant?

Whether you've just been struck with a brilliant idea or you're putting the finishing touches on a grant proposal, you could benefit from using one or more of these resources:

- The *Educator's Guide for Developing and Funding Educational Technology Solutions* describes the proposal process and includes a sample proposal evaluation report. To order, contact Educational Support Systems, 1505 Black Mountain Road, Hillsborough, CA 94010; 415-344-7046.
- *The Foundation Center's Guide to Proposal Writing* features advice on how to draft an effective funding request including components of the grant proposal package, interviews with grantmakers to find out what they look for, and what's involved in pre-proposal planning. Contact The Foundation Center, 79 Fifth Avenue, New York, NY 10003-3706; 800-424-9836.
- *The Foundation Center's User-Friendly Guide* guides the novice grantseeker through unfamiliar jargon and the range of resources used by professional fundraisers. It includes information on using on-line services to gather information, writing grant proposals, and searching for potential funders. Contact The Foundation Center, 79 Fifth Avenue, New York, NY 10003-3706; 800-424-9836.
- *Getting Funded: A Complete Guide to Proposal Writing*, by Mary Hall, will help you develop a proposal from the idea stage to the final written application. Contact Continuing Education Publications, 1633 SW Park, P.O. Box 1491, Portland, OR 97207.
- *Grantseeking: How To Find a Funder and Write a Winning Proposal* is both an introduction for the beginner and a comprehensive review for the experienced grantseeker. The grantseeking process—from generating an effective idea through identifying the right grantmaker, writing a winning proposal, and administering the grant—is presented in detail with models and examples. Contact AASA, 1801 N. Moore St., Arlington, VA; 703-875-0748.
- The *Principal's Guide to Grant Success* and the *Grantseeking Primer for Classroom Leaders* will help site-level educators understand step-by-step the grantseeking process. Contact Scholastic, P.O. Box 7502, Jefferson City, MO 64102-9957; 800-325-6149.

State Discretionary Dollars

Every state allocates funds for educational improvement through grants. Your state department of education is the best source for finding out the types and sizes of technology grants. California, for example, has a School Improvement Program that supplements instructional efforts in elementary, middle/junior high, and some high schools.

To get the information you need, pose broad questions to your state department, such as "What grants offer funds to purchase educational technology for use in meeting the grant program's goals?" You'll also want to place your name on the mailing list to receive your state department of education notices of available grant money.

When writing your grant proposal, try to be open-minded, innovative, and flexible to reposition the program to meet the requirements of new funding sources.

Educational Technology Vendors

Computer hardware and software companies recognize the importance of infusing schools with the critical resources to train and teach the future workforce. As a result, companies have made foundation endowments as well as cash and product grants totaling millions of dollars to help give students and teachers access to technology. Start your research by contacting an individual company (see resources listed below) to request donation guidelines.

- *The Directory of Computer and High Technology Grants* features 600 foundations, 33 federal programs, and more than 4,000 subject entries of hardware, software, and high-technology related grants. Contact Research Grant Guides, Loxahatchee, Florida; 407-795-6129.
- *The National Directory of Corporate Giving*, published by The Foundation Center, lists data on more than 2,300 corporate funders including application information, key personnel, types of support awarded, and recently awarded grants. Call 800-424-9836.

Categorical Program Funds: Titles I & VI

Categorical funds, including Title I and Title VI monies (formerly Chapters 1 and 2), often can be used to purchase hardware, software, materials, and/or staff development that support technology-based instructional projects. With the leniency granted under the new reauthorization of the federal Elementary and Secondary Education Act, school leaders have more leeway to combine funds creatively.

For an explanation on how these funds can be used, contact AASA at 703-875-0748 to order the book, *Great Expectations: Understanding the New Title I.*

Creatively Combining Several Fund Sources

As long as you follow the applicable rules and regulations, almost any federal source of funding can be combined with other sources. Essentially you can combine more than one funding source to pay for a project that benefits eligible children under each of the programs involved. The key is to disperse funds from each contributing source to pay only the costs allowable under that contributing source.

Most federal programs allow other students to use equipment and instructional materials purchased under the program if all eligible students have participated to the fullest extent, and participation by non-eligible children will not reduce the useful life of the equipment.

Check all state and local regulations pertaining to the combining of federal funds with state and local funds before you move ahead.

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